CHAPTER 1

CASE MANAGEMENT: DEFINITION AND RESPONSIBILITIES

This chapter puts forward the definition of case management and the responsibilities case managers carry for clients in their caseloads.

* The handout titled **Building Blocks** is useful to give students an overview of the textbook and the course. The handout shows how each learning module provides a foundation for the next one and illustrates how one becomes professional in the social services.
* This textbook is primarily concerned with teaching best practice for case management. The first and most important concept students need to learn from reading this chapter is that case management strives for a **global view of the client.** Discussions can be about the importance of noting all a client’s problems and potential problems and taking steps to address each one.
* **Assessment, planning, linking, and monitoring** are the four basic steps of case management. Using the textbook, go over the steps with students and talk about how this process allows the case manager to manage the needs of the client and the interventions developed with the client. Ask students how they see the case management process moving clients forward.
* There are new forms of case management being developed all the time. **Blended or targeted case management** and **peer support** are recent ways strongly advocated by the Substance Abuse and Mental Health Services Administration (SAMHSA). Ask students when these would work best for clients. In the exercises, encourage students to think about adding blended case management or when peer support might be useful.
* **Planning** is one of the most important activities a case manager does. Talk about the different types of agencies using examples from your own community as illustrations. Good case managers follow a leave-no-stone-unturned approach in looking for just the right intervention for their clients. Stress developing plans that are innovative and use resources beyond formal agencies. Have students do the exercises at the end of the chapter and ask them to choose resources within their own community, using the phone book and other sources of information. Students should know how to include support groups or folk support groups when planning for clients. Comment on how innovative a plan is or how students could improve their plans with something more innovative.

One of the mistakes students often make is to send the client to a number of different places for services. When you read the service plan, you get the picture of a person running hither and yon trying to secure services and follow the plan. Ask students to look for places where a client can receive several services at the same time. For example, a health clinic may also have a counseling service or a partial hospitalization program may also help the client find a job as he or she nears discharge.

* One of most important concepts for you to stress with relation to case management is **Self-determination.** Go over the arrogance that can occur when workers think they know better than clients what clients are facing in their everyday lives. Stress the importance of documentation when working with clients on planning or any other aspect of case management; there needs to be documentation showing that the client participated and was asked these questions:

1. What does the client see as the problem?

2. What does the client believe should be addressed first?

3. What kind of services is the client seeking; does the client

have something specific in mind?

* The **Resiliency and the Recovery Models** are ideas put forth by SAMHSA specifically for professionals who are practicing with adults and children who have mental health or substance abuse problems. This more hopeful approach, in part made possible by more effective medications, should be discussed with students. To find information on these models, you can go to the website of U.S. Department of Health and Human Services Administration and type in SAMHSA. At the SAMHSA site search for the Resiliency and Recovery Models and you will find numerous articles on how the government recommends applying these models. Students should understand the importance of this approach.

Ask students to talk about the Fundamental Components of Recovery, found in the Appendix, and discuss how using these as principles progress becomes a respectful collaboration. Prepare students too for the fact that setbacks will occur. Progress is not always even. The question to ask students is this: Do we allow people to make mistakes or poor choices or have relapses or do we believe once a client is involved with us the client can only progress toward greater wellness?

* Separate **case management and therapy.** Student will often assume, particularly after learning all the communication skills, that they are now skilled enough to do therapy. Case management is therapeutic, but it is not therapy. Students will understand the difference if you point out that therapy involves treatment for a problem. Case management involves referral to the place where treatment will be given and support of the client while the treatment takes place.

**GOING OVER THE EXERCISES**

***Case Management***

There is no single correct answer for these exercises. Help students to develop a leave-no-stone-unturned attitude toward addressing client problems and finding referral sources in the community. Have students consider involving neighbors and family (with the client’s permission, of course). Ask them to think about support groups in the community or seminars, such as a parenting or marriage seminar, in addition to formal services. Have students use peer support where appropriate.

If students don’t know where to find support groups, generally a county administrator’s office or another local organization keeps a directory of these. Students can look around for seminars in their communities. There are often training or teaching organizations that give seminars and training for the general public.

***Decide on the Best Course of Action***

This case is designed to get students to recognize the dilemmas that can occur in case management work with clients. There is no right answer. Instead, explore the pros and cons of each option and let students decide what might be the best choice given the circumstances

**QUESTIONS FOR CHAPTER 1**

**FOR DISCUSSION OR AS TEST QUESTIONS**

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1. Can you name and describe, without looking in the book, the four

case management tasks?

2. What are the underlying principles of case management?

3. How does managed care affect case management?

4. What is an individualized plan for a consumer?

5. Name and describe four of the fundamental components of Recovery.

6. How are case management and therapy different?

7. Why is it important to be able to collaborate with other agencies?

8. Why do we use case managers?

9. Describe assessment from a case management perspective.

10. How would you go about finding resources in your community?

11. What is the reason for using peer support?

12. Describe a folk support system.

13. Why are we concerned with individualized case planning?

**HANDOUT: BUILDING BLOCKS FOR THE SOCIAL SERVICE WORKER**

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We start at the bottom where we put down the foundation with what you know, move up to how you think and feel about certain situations and issues, build on top of that what you say to the people you serve and how you say it, and finally at the very top we place your *professional* helping skills.

**HOW DO YOU HELP?**

**SKILLS AND INFORMATION TO ASSIST CLIENTS**

**ECOLOGICAL MODEL**

**CASE**

**MANAGEMENT**

**ETHICS**

**WHAT DO YOU KNOW?**

**FOUNDATIONS FOR BEST PRACTICE**

**WHAT COMES ACROSS WHEN YOU SPEAK?**

**EFFECTIVE COMMUNICATION**

**WHAT DO YOU THINK AND FEEL?**

**CLARIFYING FEELINGS**

**USEFUL ATTITUDES**

**BOUNDARIES**